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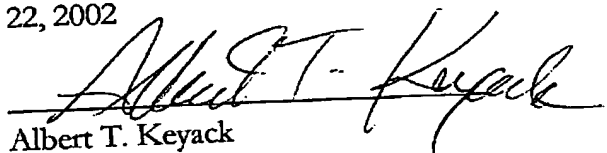
TO: Assistant Commissioner of Patents	**FROM:** Albert Keyack
COMPANY: USPTO Art Unit 2173 (Hailu, T.)	**DATE:** June 22, 2004
FAX NUMBER: (703) 872-9306	**TOTAL NO. OF PAGES INCLUDING COVER:** 32
PHONE NUMBER: (703) 306-2799	**SENDER'S REFERENCE NUMBER:**
RE: Serial No. 09/928,009	**YOUR REFERENCE NUMBER:**

☐ URGENT   X FOR REVIEW   ☐ PLEASE COMMENT   ☐ PLEASE REPLY   ☐ PLEASE RECYCLE

NOTES/COMMENTS:

Response (7 pages, 2 sheets additional drawings, 2 sheets "clean" claims and 20 pages of specification–10 pages showing amendments and 10 pages "clean")

I, Albert T. Keyack Registration No. 32,906 hereby certify that this correspondence is being transmitted via facsimile addressed to the Commissioner of Patents and Trademarks, Washington, D.C. 20231 on June 22, 2002

Albert T. Keyack

IN THE UNITED STATES PATENT AND TRADEMARK OFFICE

Art Unit   : 2173
Examiner   : Hailu, T.
Serial No.   : 09/928,009

Filed   : April 20, 2001
Inventor   : Heiser
Title   : Multi-Level Software for Generating Wills and Trusts Online

Dated: June 22, 2004

AMENDMENT

Commissioner of Patents

Washington, DC 20231

Sir:

    This is responsive to the Office Action dated March 25, 2003 in the above-referenced pending patent application. Please enter the following amendments:

In the Specification

    Please substitute the attached pages of the specification. No objectionable new matter has been inserted.

    Please add new FIGS. 2-5. No objectionable new matter has been inserted.

In the Claims

    Please amend the claims 1-7 and 9-10 and cancel claim 8 as follows:

1.   (Amended) A method of automatically generating a will document, comprising ~~the steps of:~~

    providing a user with a plurality of input screens, arranged in a sequential and logical order, wherein said screens include <u>an initial screen for selecting as between at least two levels of complexity, wherein each of said levels of complexity will subsequently provide</u> one or more <u>different</u> screens requiring: personal and family information, financial information, asset information, estate distribution selections, trust parameter selection, and guardian and trustee selections; and

    processing data input by an end-user to automatically create a will document.